

# SITSD Service Desk

## POB Web Portal Customer User Manual



4/23/2012

## Commonly Used Terms

**Service Desk** - The Service Desk is the primary point of contact for the customer.

You can reach the service desk at (406) 444-2000 or 1-800- 628-4917.

**Super User** - A customer who has the authority to submit cases for anyone in his/her organization. The Super User has the authority to view all cases within his organization.

**Incident** – - An incident is an unplanned interruption to an IT service. For example, something is broken - I cannot get to my email, my phone will not work.

**Service Request** – A Service Request is a request for a service i.e. moves a desktop, activate an email account, and add/delete a phone. Example: I need my password changed, I need information regarding billing...

**Case** – a record of a request for any kind of support from a customer about a product or service - currently the option is an incident or service request.

**POB** – Point of Business - The name of the Service Desk ticketing tracking tool from Wendia.

**Priority** – used to classify Cases according to their importance.

**Urgency** – works in close relation with Impact and Priority and helps determine the prioritization of Cases.

**Impact** – works in close relation with the Urgency and the Priority and helps define the impact a problem will have on the business processes in the organization it remains unsolved, i.e. whether the impact will be light, medium, or severe, etc.

## **Logging in**

To access the SITSD Service Desk, go to the following URL. <http://sitsdsupport.mt.gov>

You will automatically be logged in. The home page is the "Announcements" page.



***The Service Desk Online home screen has five tabs/options:***

- **Open a Case** – Open and submit your incident or service request.
- **Search Cases** – Search your cases.
- **Forms** – Currently, this area hosts the Firewall and change form. Only those with specific rights can access the forms.
- **Reporting** – Available case reports.
- **Announcements** – Addressed to all users or all contact persons on the logon page. The list of announcements aimed at you personally or at you as a member of your organization.

1. **Open a new case:** Here you can register and submit your incident or service request.

**To register a new case:**

- Select **Open a Case** on the announcement page.
- **Select Case Type:** Select the drop down menu and chose one of two options  
Incident – something is broken – “I can’t” questions  
Service request – “I need” something. Password reset, information etc.
- **Select Impact:** How many users are affected?
- **Select Urgency:** How soon do you need it?
- **Enter a short description:** brief description of the error i.e. printer isn’t working

- **Enter a detailed Case description:** Describe in detail, the error and what attempts you tried to resolve the problem. There is a **File Attachments** tab to attach and submit screen shots etc.

OPEN A CASE   SEARCH CASES   FORMS   REPORTING   ANNOUNCEMENTS

## Register new case

Fill in the fields below. After you finish, click the Open Case button in order to register your Case at the State of Montana Technical Support. Please remember the Case Id generated when registering the case. This Id will be your reference to the case at the State of Montana Technical Support. It is also possible to enter an additional reference to the Case in the Reference field below.

You are logged in as: Teresa Enger (Department of Administration)

General

File Attachments

Select Case Type  
Service Request

Select Impact  
1 Person

Select Urgency  
Now

Enter a short Case Description  
My printer isn't working

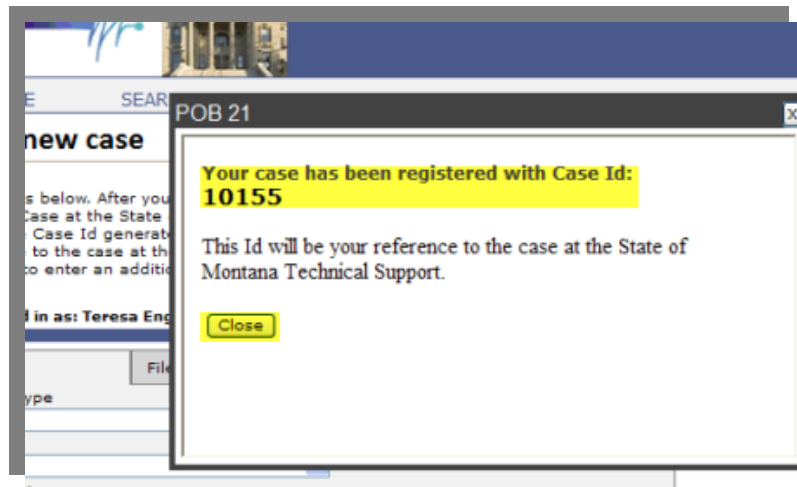
Enter a detailed Case Description  
My printer quit. I rebooted my computer, checked the cables and it still won't work. Attached is the error I received.

Enter Agency Reference #  
IS Help Desk 12525

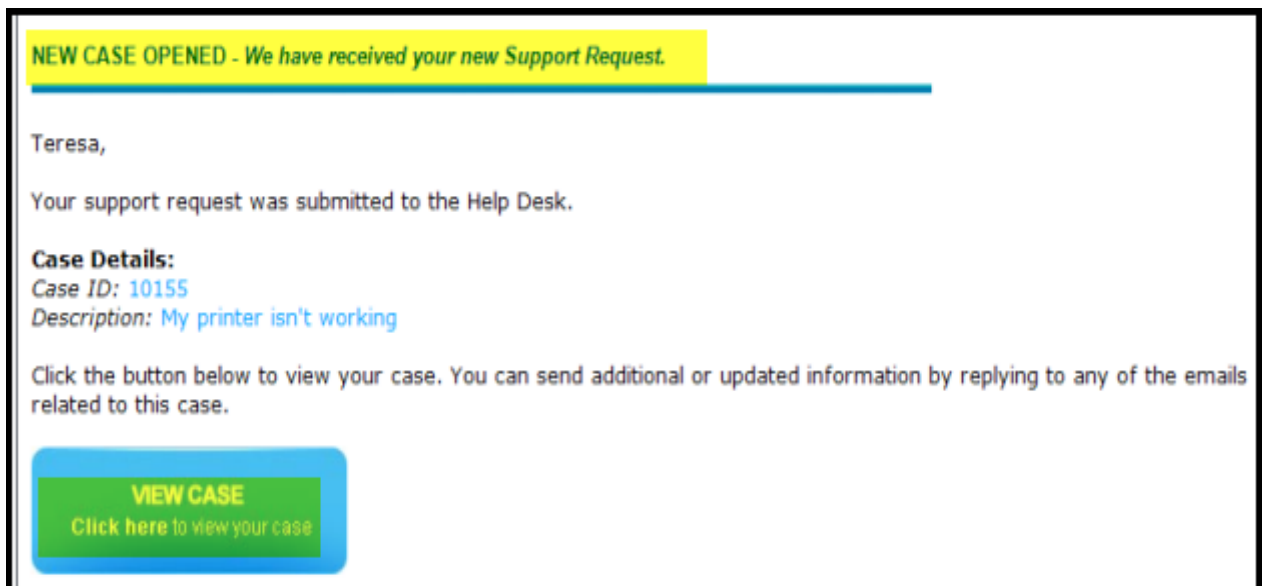
Open Case

- Select the **Open Case** button at the bottom of the page.

After submitting the case, a popup appears with with your registered case *ID number*. This number is to reference your case. You can use this number at anytime to get the status of your case. Select **CLOSE**.



You will now receive an EMail from the SITSD Service Desk stating your issue is received. The case is now opened and routed to the appropriate group. To view the Case details select the **VIEW CASE** button.



The **Case details** screen:

## Case Details

The Case Details window presents the complete information on the selected case.

**You Are Logged in as: Teresa Enger (Department of Administration)**

General				
Case Id	10155			
Description	My printer isn't working			
Status	Open			
Reference	HHS Help Desk 125			
Case Type	Service Request			

Contact				
Organization	DOA	Department of Administration		
Contact	cx0101	Teresa	Enger	444-1830

Symptom Details

Solution Details

Connected to

File Attachments

Category

If You have more information about the case, please enter it here.

3/28/2012 4:07:26 PM cx0101 DOA  
Disregard this request, my printer is now working.  
.....  
3/28/2012 3:12:52 PM cx0101 DOA  
My printer quit. I rebooted my computer, checked the cables and it still won't work.  
Attached is the error I received.  
.....

Disregard this request, my printer is now working.

Edit  
Add  
Cancel

Apply Changes

Within the *CASE DETAILS* screen, you can add information.

Adding information;

- Select the *Edit button* – you will be presented with a new text field. Add additional information here.
- To save your text, select Apply **Changes** button. Upon saving your text, the Service Desk will receive an email indicating you have added information.
- To exit you must **X** out of the application.

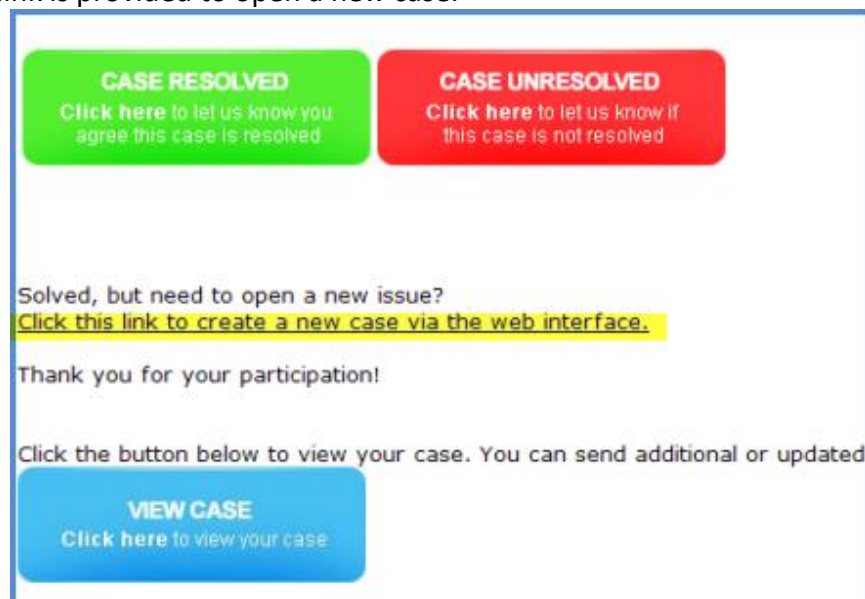
**Case Solved** - When your case has been resolved, you will receive an email asking you to select one of three buttons.

**\*NOTE** - If you do not respond to this email within 48 hours, we will assume your issue is resolved and the ticket is closed.

The three options are:

- Case Resolved – lets the Service Desk know you agree the case is resolved. An email is generated and additional comments can be added to the case.
- Case Unresolved – lets the Service Desk know the case is not resolved. An email is then generated and additional comments can be added to the case.
- View Case - view your case send additional or updated information.

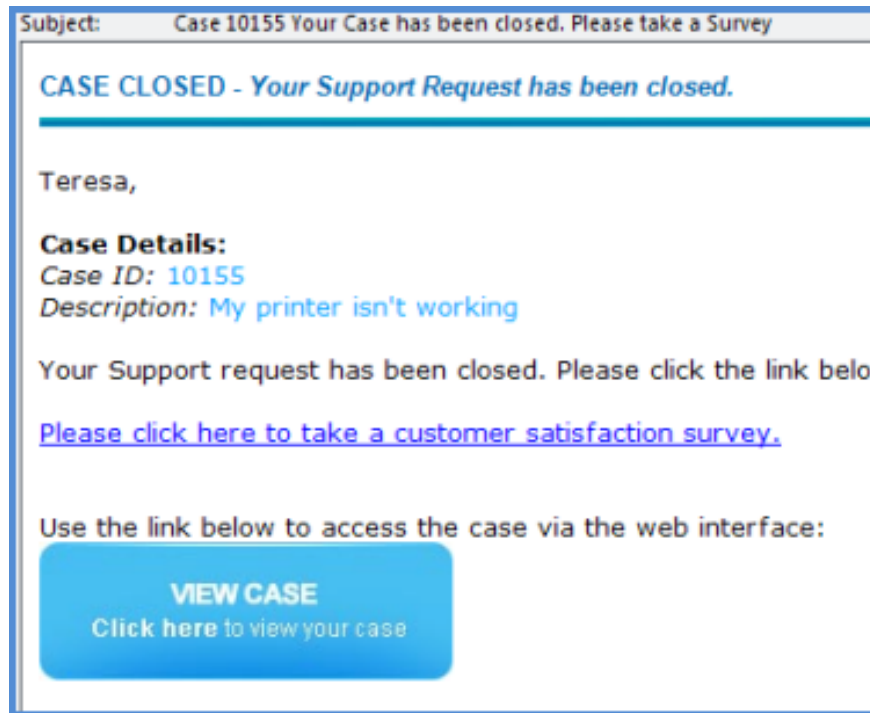
In addition, a link is provided to open a new case.



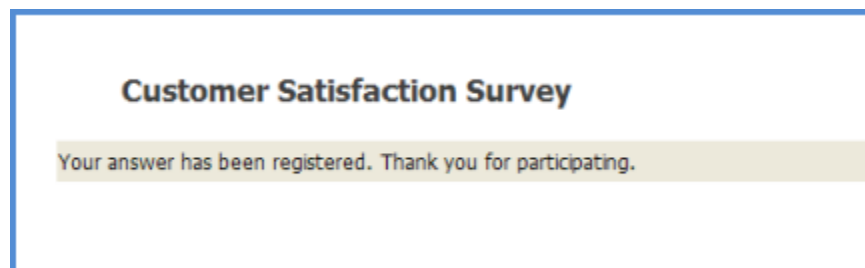
The screenshot displays a user interface for a case resolution email. At the top, there are two buttons: a green 'CASE RESOLVED' button with the text 'Click here to let us know you agree this case is resolved' and a red 'CASE UNRESOLVED' button with the text 'Click here to let us know if this case is not resolved'. Below these buttons, the text 'Solved, but need to open a new issue?' is followed by a yellow-highlighted link: 'Click this link to create a new case via the web interface.' Below this, it says 'Thank you for your participation!'. At the bottom, it says 'Click the button below to view your case. You can send additional or updated' followed by a blue 'VIEW CASE' button with the text 'Click here to view your case'.

**Case Closed** – After you are satisfied with the resolution and you have submitted the email agreeing the case has been resolved the Service Desk will close the case.

You will receive an email indicating you Support Request is closed. In the email is an opportunity to click on a link to take a brief **Customer Satisfaction Survey**.



After taking the survey, you will see the following:





## 2. Search Cases

Select the ***Search Cases*** (drop down field) then *My Cases*.

- My Cases – Information on all cases created by the currently logged user, the registered cases the status, etc. You can filter by Status, Date or specific case. If you are a “**Super User**”, you will see all tickets for your organization.
  - Double click on the case you are interested in viewing. The case details window contains all information on the selected case. Included is the symptom details, solution details, connected to (other related cases) and file attachments.
  - If you would like to add information to the case select the *edit* button, add the information and select the *apply changes* button.
- Knowledge – Cases which are solved and have the knowledge case type. This function is **NOT** available at this time – stay tune.

**Filtering:** You can filter your list of cases by Status, date and a specific case number.

The screenshot displays the STATE ITSD Service Desk Online interface. At the top, there is a header with the logo and the text "SERVICE DESK ONLINE ...it's all about service." Below the header is a navigation bar with links: OPEN A CASE, SEARCH CASES, FORMS, REPORTING, and ANNOUNCEMENTS. The main section is titled "Case List" and contains a description of the case list window. Below this, it states "You are logged in as: Teresa Enger (Department of Administration)". A search result summary shows "2 Records found". A table lists the cases with columns for Case Id, Open Time, Status, and Description. At the bottom, there is a filter section with dropdown menus for Status, Date, and Specific case, along with a Search button.

Case Id	Open Time	Status	Description
10155	3/28/2012 3:12:52 PM	Open	My printer isn't working
10159	3/29/2012 11:32:50 AM	Open	Testing editing a case after it has been resolved and sent to the customer to view

Filter

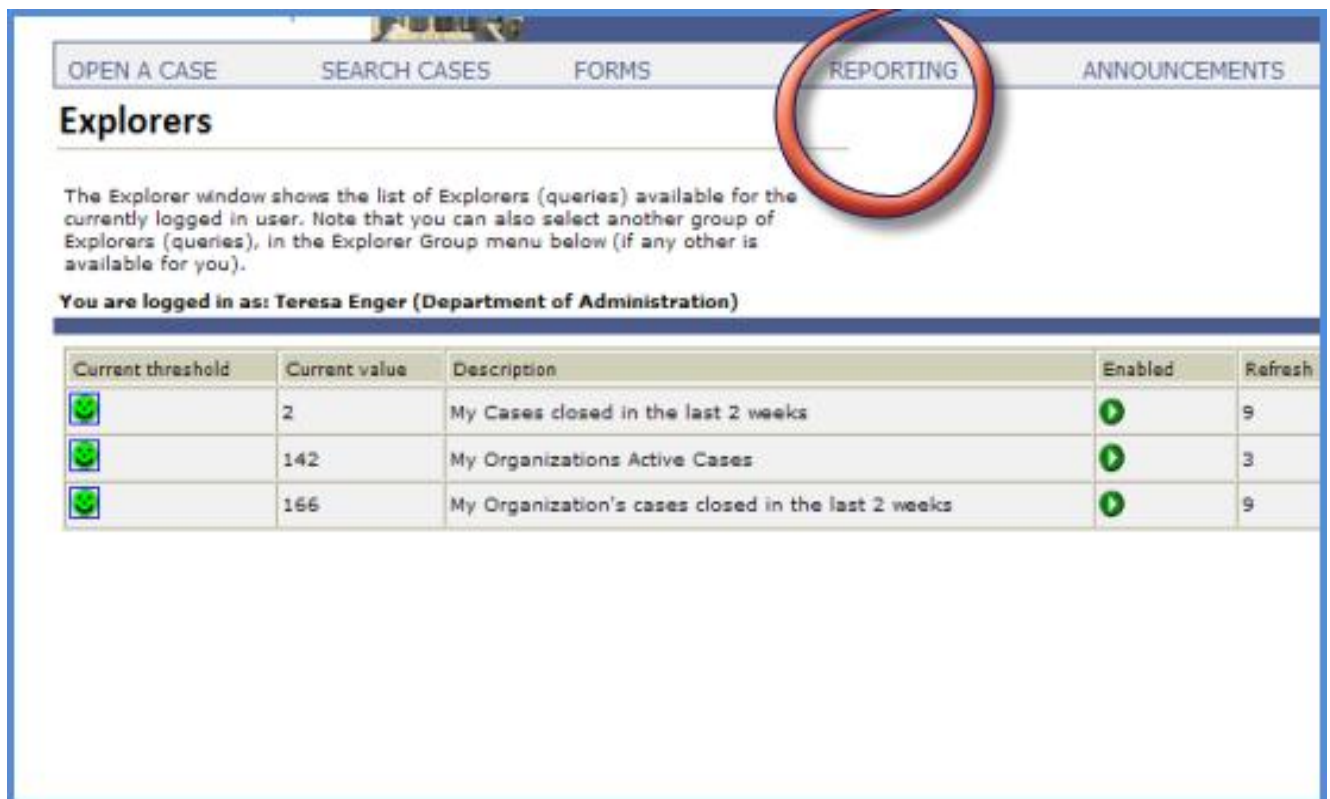
Status: Closed (selected)

Date: Opened (selected)

Specific case: Case id, Description

Search







3. **Forms:** - Currently, the only available form for the customer is the firewall form. In order to submit a firewall service request, you must be a member of the '! AGENCY IT SECURITY OFFICERS' active directory group.
4. **Reporting** - access and run the end user explorers and reports.
  - Explorer – shows list of queries available for the currently logged in user.
  - Reports – customized reports (at this time, there are none).



**Explorers**

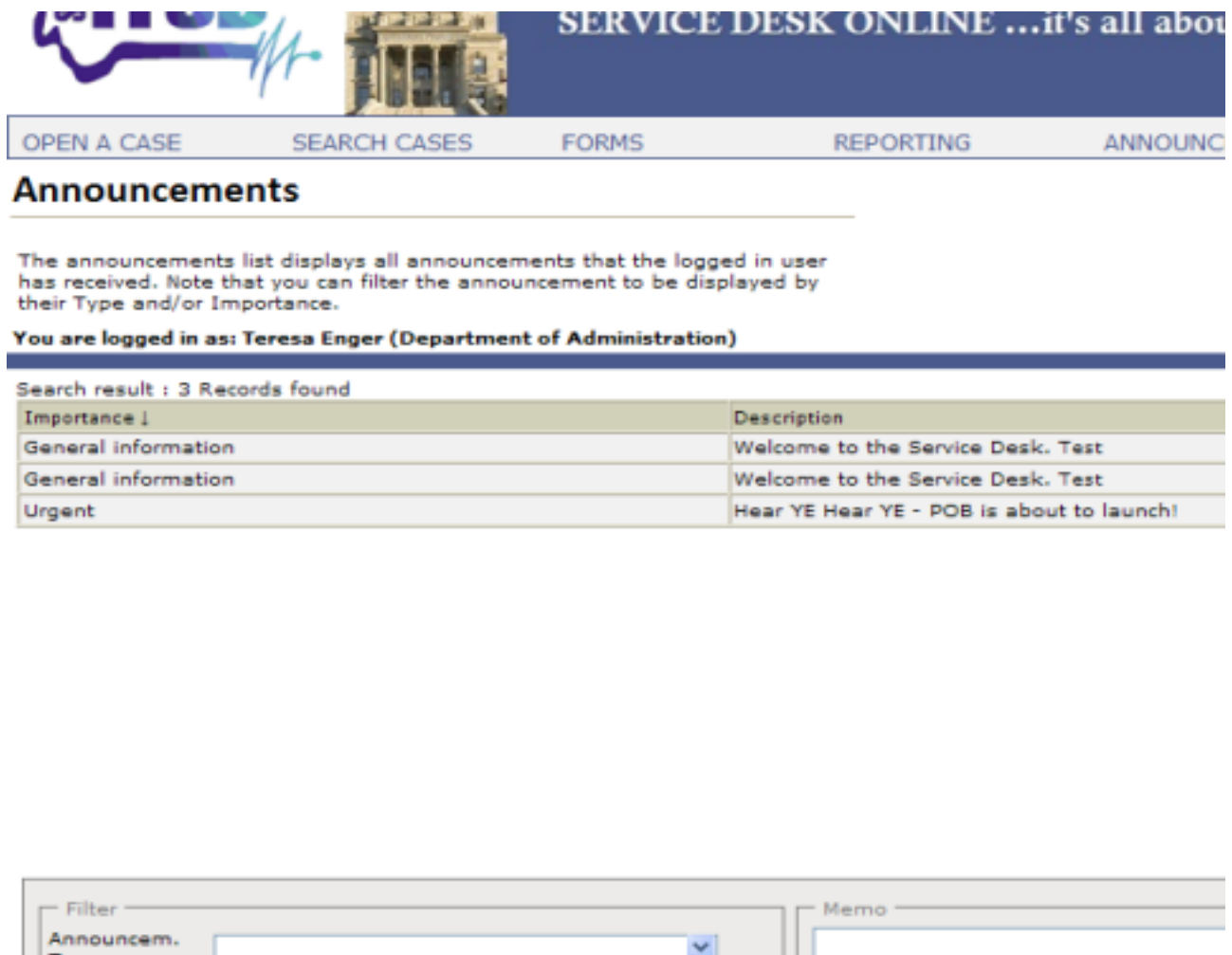
The Explorer window shows the list of Explorers (queries) available for the currently logged in user. Note that you can also select another group of Explorers (queries), in the Explorer Group menu below (if any other is available for you).

You are logged in as: Teresa Enger (Department of Administration)

Current threshold	Current value	Description	Enabled	Refresh
	2	My Cases closed in the last 2 weeks		9
	142	My Organizations Active Cases		3
	166	My Organization's cases closed in the last 2 weeks		9

5. **Announcements** – Any announcements or information posted by the SITSD Service Desk will be posted here. In addition, the list displays all announcements that the logged in user has received.

Note - you can filter the announcement by your type and/or Importance.



The screenshot shows the SITSD Service Desk Online interface. At the top, there is a header with the text "SERVICE DESK ONLINE ...it's all about" and a navigation bar with links: "OPEN A CASE", "SEARCH CASES", "FORMS", "REPORTING", and "ANNOUNCEMENTS". Below the navigation bar, the "Announcements" section is highlighted. It contains a description: "The announcements list displays all announcements that the logged in user has received. Note that you can filter the announcement to be displayed by their Type and/or Importance." Below this, it states "You are logged in as: Teresa Enger (Department of Administration)". A search result summary indicates "3 Records found". A table displays the results:

Importance ↓	Description
General information	Welcome to the Service Desk. Test
General information	Welcome to the Service Desk. Test
Urgent	Hear YE Hear YE - POB is about to launch!

At the bottom of the screenshot, there is a filter section with a dropdown menu labeled "Filter" and a "Memo" field.

***If you would like, you can call the SITSD ServiceDesk and we will be happy to open a case for you! (406) 444-2000 or 1-800-628-4917***

***Thank you.***